

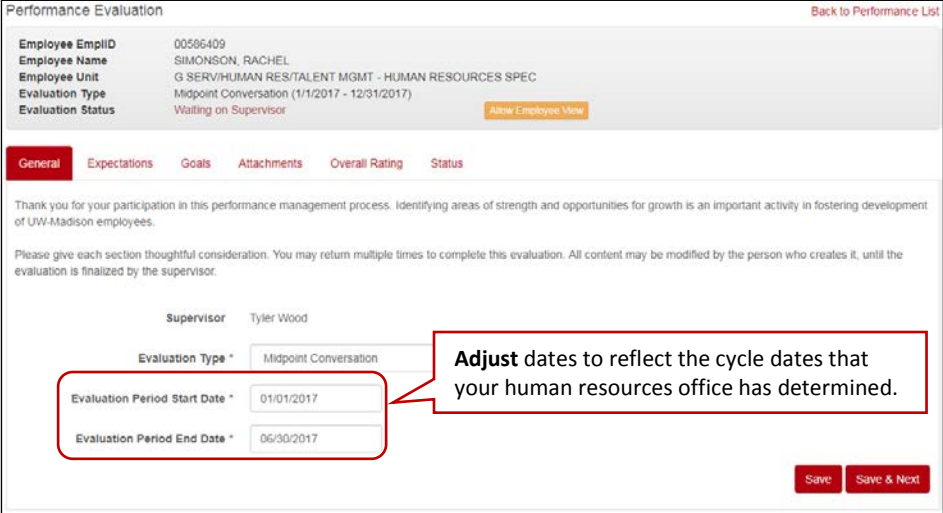


HOW TO: COMPLETE A MIDPOINT CONVERSATION



A documented Midpoint Conversation is required midway through each performance year. See the Performance Management Policy at <https://kb.wisc.edu/ohr/policies/page.php?id=49583>. Cycle timing is determined and communicated by each school/college/division’s performance management program.

Supervisor Action	Employee Action
<p>1. Supervisor logs into PMDP with NetID. (Available at pmdp.hr.wisc.edu or by adding the PMDP widget to your MyUW portal.)</p>	<p>1. No action required.</p>
<p>2. Start the evaluation by clicking either the EmplID or Start Evaluation.</p> 	<p>2. No action required.</p>
<p>3. Select Create New. Select Midpoint Conversation and Create.</p> 	<p>3. Employee receives email indicating an evaluation has been started. No action required.</p>
<p>4. Revise the Evaluation Period Start Date and Evaluation Period End Date to reflect the cycle dates that your human resources office has communicated. (Consult with your unit human resources contact to confirm dates.) Click Save & Next.</p> 	<p>4. No action required.</p>

5. If this is the first evaluation, use Add Row to enter each Job Function and Expectation and **indicate rating**. If the functions and expectations carried forward from a previous evaluation, **rate each**. Click **Save & Next**.

The screenshot shows the 'Expectations' tab in the PMDP system. It features a table with four columns: 'Job Function', 'Expectations', 'Rating (Definitions)', and 'Rating Explanation'. The 'Rating' column has a dropdown menu highlighted with a red box. Below the table, there is an 'Add Row' button and 'Save' and 'Save & Next' buttons.

5. No action required.

6. If this is the first evaluation, you will need to add current goals, note progress, and **rate each**. If the goals carried forward from a previous evaluation, **rate each** and **add at least one Future Goal**. (This may be a current goal that is copied and moved to future.) Click **Save & Next**.

The screenshot shows the 'Goals' tab in the PMDP system. It features a table with four columns: 'Goal Type', 'Goal Description', 'Progress', and 'Rating'. The 'Rating' column has a dropdown menu highlighted with a red box. Below the table, there is an 'Add Row' button and 'Save' and 'Save & Next' buttons.

6. No action required.

7. Upload attachment if needed. Click **Save & Next**.

7. No action required.

8. Schedule conversation with employee. When prepared (either before, during or after the in-person conversation), click **Allow Employee View** on the evaluation. This will allow the employee to view all information currently in the evaluation. The employee can upload an attachment, but does not have the ability to add or edit information that you have entered.

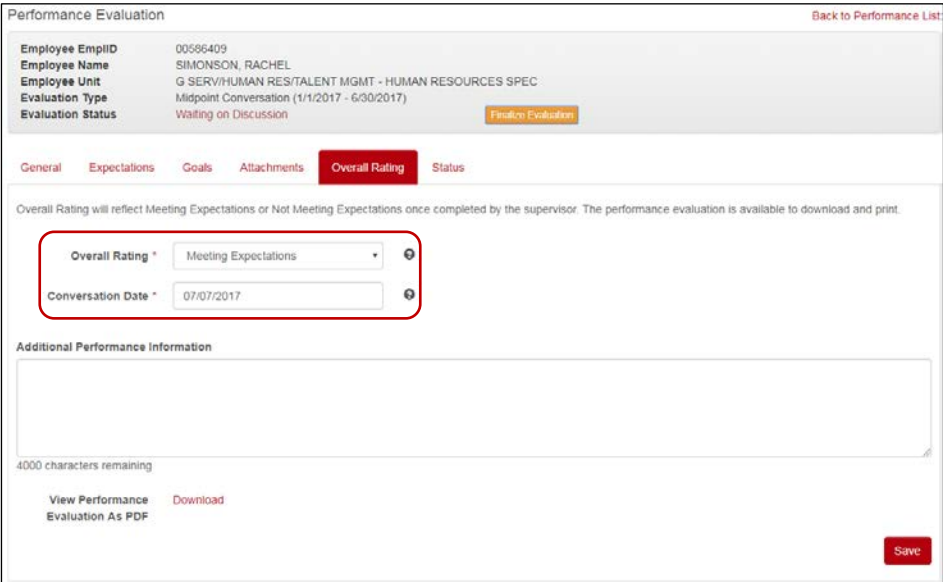

[Allow Employee View](#)

8. Employee receives email that supervisor allowed view. **Log in to PMDP** with NetID. (Use email link, pmdp.hr.wisc.edu or add PMDP widget to MyUW portal.)

9. No action until employee allows supervisor view.

9. Review information, **upload attachment** if desired, click **Allow Supervisor View**.

[Allow Supervisor View](#)

<p>10. Meet with employee and have conversation.</p>	<p>10. Meet for conversation.</p>
<p>11. After (or during) conversation, open the evaluation and record the Overall Rating (either Meeting or Not Meeting Expectations) and Conversation Date. Click Save. Click Finalize Evaluation. (Employee has to “Allow Supervisor View” in order to Finalize. An error message will indicate if the employee needs to allow view.)</p> 	<p>11. Employee receives email notification that an evaluation has been completed and is waiting for acknowledgement.</p>
<p>12. No action required</p>	<p>12. Employee opens evaluation and Clicks Employee Acknowledgement and selects Reviewed and AGREE or Reviewed and DISAGREE.</p> 
<p>13. Supervisor and Human Resources receive email notification that evaluation is final and acknowledged.</p>	<p>13. Employee receives email notification that evaluation is final and acknowledged.</p>
<p>14. END OF PROCESS</p>	<p>14. END OF PROCESS</p>